





# Adding Equipment

## Adding Equipment:

1. From the Equipment list, click **New Equipment** to create a new entry.



2. In the first section of the New Equipment window, users can provide the following information: Equipment Name, System, Make, Model, Asset/Tag #, Serial Number, and Warranty Expiry.
  - The Equipment Name and System fields are required fields; additional information can be provided at a later date.

The 'New Equipment' form contains the following fields:

- Equipment Name: Air Handling Unit #2
- System: Air Handling Systems
- Make: Trane
- Model: Quantum
- Asset/Tag #: 128937-29
- Serial Number: AHU298EB
- Warranty Expiry: 9/24/2019

3. In the next section, enter the location where the equipment resides: Property, Building, Floor, and Suite.
  - The Property, Building, and Floor fields are required fields. Suite location (if relevant) can be provided at a later date.

The location selection section of the form contains the following fields:

- Property: Hamill Court
- Building: Hamill Court
- Floor: Basement
- Suite: Mechanical Room

4. In the last section, enter any important notes concerning the equipment in the Details field, then click **Create** to add the equipment.
  - The Details field is not a required field.

The 'Details' field contains the following text:

Filter Type:  
A = 2-in. MERV 8  
B = 2-in. MERV 13  
C = 2-in. MERV 8/4-in. MERV 11  
S = Special

At the bottom of the form, there are 'Create' and 'Cancel' buttons.

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5. Users are taken directly to the Equipment Details screen. The information provided on the previous screen is located in editable cards to the left; users can click on any of these cards to edit them, if permitted through Role Security.
- The References card to the bottom-left also allows users to add references (external links/URLs) to any online resources that may be available for the equipment.
  - The Schedules, Work Orders, Gauges, and Attachment tabs allow users to do the following:
    - Add, edit, and deactivate work order schedules.
    - View a list of completed work orders related to the equipment.
    - Add, edit, or view gauges and gauge readings.
    - Add, edit, or remove file attachments associated with the equipment (these attachments will also be appended to scheduled work orders).
    - For a general overview of the equipment details screen, see [The Equipment Details Screen](#).